United States
Department of Agriculture

Foreign Agricultural Service

March 1985

Foreign Agriculture

French Agriculture: From Farm to Table

Marketing News

MEF Project Focuses on Japanese Beef Import System

The **U.S. Meat Export Federation (MEF)** is completing an in-depth research project on Japan's beef import and distribution systems with a $25,000 grant from the California Beef Council. The project covers Japan's domestic beef situation, its beef import and distribution systems and strategies for increasing U.S. exports to Japan.

"Japan is the most important export market for U.S. beef, yet there are few good sources for gaining an understanding of this market," MEF Asian Director Phil Seng said. The MEF study identifies markets, highlights opportunities and reviews strategies for U.S. suppliers.

According to Seng, Japan offers U.S. meat exporters the greatest potential for future sales. Japan's Ministry of Agriculture, Forestry and Fisheries predicts that by 1990, Japan will import 220,000-290,000 tons of beef, compared with 128,000 in 1983. Seng said that if these projections are correct, and if 50 percent of the incremental beef imports come from the United States, the value of U.S. sales to Japan could total $420-550 million.

Wheat Associates Aid Brazil's Milling/Baking Industries

Brazilian milling and baking industries are facing the possibility of decreased consumer demand as the government reduces the consumer subsidy for wheat. At the same time, many small mills and bakeries lack the training and expertise needed to assure a cost-efficient variety of high-quality wheat products. **U.S. Wheat Associates (USW)** is trying to help the Brazilians by sponsoring activities to upgrade the technical capability of bakers and millers.

USW recently concluded a series of 10 regional one-week baking seminars for medium-scale bakers. In addition, the **Kansas Wheat Commission** donated a set of U.S.-built experimental mills and a sifter to Brazil, the only such equipment in the country. The mills will be used to teach apprentice millers at Brazil's vocational school for millers and bakers.

Wheat imports to supply Brazil's rapidly growing population are increasing 4 percent annually. Imports will account for about 5 million of the country's 6.3-million-metric-ton wheat consumption in 1984/85. The United States traditionally supplies 50-70 percent of these imports, although competition from Canada and Argentina is intense and on the increase.

USW's regional director of South America said such projects should help to increase wheat consumption in Brazil and to improve its capability of using a higher quality wheat than that available domestically.

Gulf States Are Target of Wheat Marketing Efforts

Market development efforts towards improving the U.S. market share in several Arabian Gulf nations were accented recently in Bahrain, the site of a two-day U.S. grain marketing seminar. The seminar, hosted by **U.S. Wheat Associates** and the **Bahrain Flour Mills Company,** was attended by representatives from the United Arab Emirates, Bahrain, Kuwait, Oman, Jordan and Iraq. Together, the Gulf States make up a 1-million-ton wheat market, while Jordan and Iraq import 350,000 tons and 2.5 million tons, respectively.

The seminar provided wheat buyers with an overview of various market forces, such as supply and demand, used to conduct their business. Also included were in-depth presentations on the U.S. and world wheat situation, a review of the futures market in buying grain, tendering and contract procedures for buying U.S. wheat, the role of the U.S. Department of Agriculture in world trade and an analysis of the ocean freight market.

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France, Formidable Export Rival, Also a Big Agricultural Market

From just about every vantage point, France is a force to be reckoned with in the world market for agricultural products.

It is the largest agricultural exporter in Western Europe—and the second largest agricultural exporter in the world.

It also is a signficant importer of a variety of agricultural products, with an import bill of $12.6 billion in 1983.

Here is a brief background for those who want to keep a close eye on France both as a competitor and a prospective customer.

Agricultural Powerhouse

France is the largest agricultural producer in the European Community (EC), accounting for 28 percent of total output.

French farmers, who control about one-third of EC farmland, are the major EC producers of grains, dairy products, beef and veal and oilseeds.

About 1.8 million people, roughly 8 percent of France's total labor force, are directly engaged in agriculture. Agriculture is the single largest employer in France.

Of the 1.08 million French farms in operation, most are family enterprises. Just about nine out of 10 farms are 50 hectares or less in size, while a scant 2.7 percent are 100 hectares or larger.

Land Use Trends

About three-fifths of France's 136-million-acre land area is devoted to agricultural production.

Cereals account for 28 percent of the total farmland area, forage crops for 19 percent, and crops such as oilseeds for about 3 percent. Permanent grasslands account for 40 percent. Vineyards account for 6 percent, vegetables for 2 percent and orchards and family gardens make up the balance.

During the past 20 years, French agricultural production increased by nearly two-thirds. Much of the increase in output was due to gains in productivity, since the number of French farms declined by more than half.

Animal products account for 54 percent of the total value of agricultural sales, while grains represent 17 percent of the total value.

Key Trading Partners and Products

More than half of France's total agricultural trade is with other members of the EC. The major non-EC trading partners or regions in more recent years have been the Soviet Union, United States, Switzerland, the Middle East (mainly Saudi Arabia) and Africa (primarily Nigeria, Egypt and Algeria).

Grains, beverages (mostly wine and spirits), dairy products, fruits and vegetables and sugar typically account for about three-fifths of the value of French exports.

On the import side, France's chief purchases tend to be livestock products (mainly meats and cheese), fruits and vegetables, tropical products (mainly coffee) and feed ingredients (mainly soybean meal). The country also imports a sizable amount of natural fibers (mainly cotton), agricultural fats and oils, tobacco and beverages (primarily wine).

U.S. Position in the Marketplace

U.S. agricultural sales to France usually exceed our purchases from that nation, although in 1984 there was a significant reversal of that trend. (See story on following page.)

Wine usually accounts for more than three-fifths of U.S. imports. Likewise, a small number of commodities account for the bulk of French imports from the United States.

For example, in 1983, three groups of products—oilseeds and meals, cereals including rice, and variety meats—made up 70 percent of our sales.

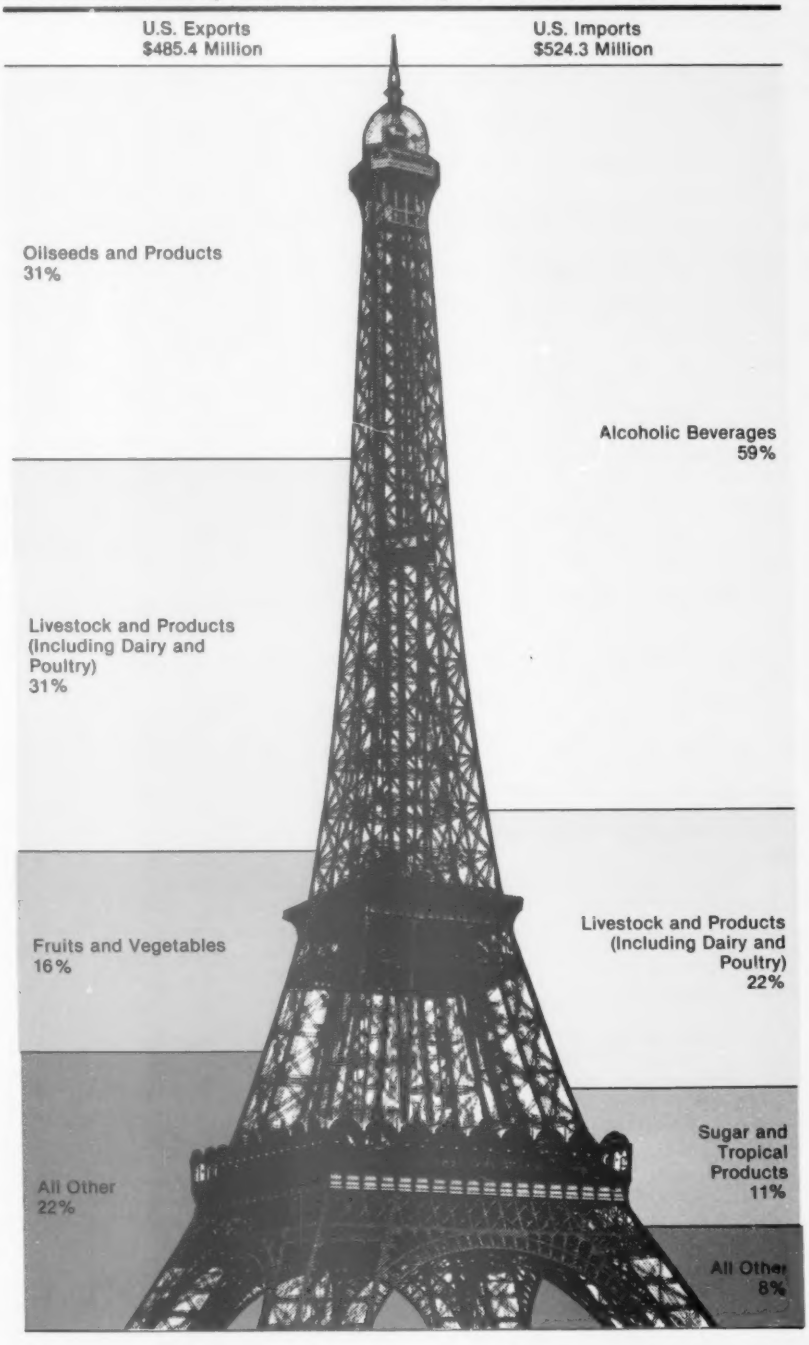
Sales Tips

When selling in this market, U.S. exporters should keep in mind that French should be used for the key documents involved in import transactions (contracts, catalogues, notices, warranty forms, order forms, delivery forms, instructions for use, phytosanitary and insurance certificates, transport documents and so on).

Likewise, it is preferable if the markings and labels on the goods themselves are printed in French. English is acceptable, but a translation must be included directly underneath. ■

This article is based on materials supplied by the office of the U.S. Agricultural Counselor in Paris, and James Lopes, Economic Research Service, Tel. (202) 447-8289.

Few Products Made Up Bulk of U.S.-French Agricultural Trade in 1983



France Records First Agricultural Trade Surplus With U.S.

By Ernest Koenig

A milestone in U.S.-French agricultural trade was reached in 1984 as French agricultural sales to the United States for the first time outstripped that country's agricultural purchases from us. Up until last year we had generally enjoyed a substantial agricultural trade surplus with France.

In all, French sales to the United States were up by more than a fourth from January-November 1983, with particularly significant gains occurring in exports of wines and spirits. These two items comprised about 71 percent of France's exports to us during the first 11 months of last year.

French wine exports to the United States gained nearly a fourth in volume and rose by nearly half in value. Champagne and other sparkling wines led the way with a value gain of 47 percent. High-quality non-sparkling wines and bottled table wines also recorded large increases.

Brandy exports to the United States were up a tenth in volume and 30 percent in value. Sales of liqueurs also rose a bit but purchases of other spirits declined.

Meanwhile, U.S. agricultural sales to France rose a modest 7 percent during January-November. Our biggest selling items, soybeans and corn, both declined in volume although soybeans were up slightly in value.

Of note, however, was the fact that U.S. sales of cotton to France more than doubled in volume and almost tripled in value as a result of the falloff in imports from the Soviet Union.

Other large value gains were recorded for peanuts, dried almonds, corn gluten feed and sunflowerseeds.

The author is the U.S. Agricultural Counselor, Paris.

French/U.S. Agricultural Trade, January-November 1984

Major Imports from U.S.	Thous. m.t.	$ Mil.	Percent change from 1983 Quantity	Value
Soybeans	437.5	123.5	−24	+4
Corn	493.2	88.5	−11	−4
Other than for sowing	492.2	83.5	−11	−4
Rice	97.0	57.6	−14	+5
Bleached, long grain	40.1	35.8	+5	+25
Decorticated, long grain	50.1	19.9	−31	−23
Raw cotton	36.1	53.7	+142	+199
Beef offals, excluding liver	22.9	39.8	−9	+15
Wheat	142.5	27.1	−13	−0.5
Soft wheat other than for sowing	102.8	19.0	+21	+31
Peanuts	40.7	26.7	+49	+101
Shelled	39.6	25.5	+53	+113
Dried almonds	7.0	23.3	+9	+96
Grapefruit	38.1	20.3	−24	−15
Industrial byproducts for feed use, excl. oilmeals	94.0	14.9	−41	−33
Corn gluten feed	17.0	2.2	+221	+196
Other than from meat, fish, grain and sugar industries	77.0	12.7	−21	−16
Beef livers	13.2	12.1	−1	+27
Sunflowerseeds	31.5	11.4	+54	+169
Racing horses for breeding	43[1]	1.6	−83	−94
Subtotal, major commodities	—	500.7	—	+10
TOTAL agricultural imports from the United States	—	651.1	—	+7

Major Exports to U.S.	Thous. m.t.	$ Mil.	Percent change from 1983 Quantity	Value
Wines[2]	1,092.4	321.1	+22	+43
Champagne	93.0	104.0	+27	+47
Other sparkling wines	38.8	6.8	+24	+43
Quality wines (AOC + VDQS)	567.0	174.7	+21	+44
"Country" wines	8.4	0.9	−51	−51
Ordinary table wines	384.9	34.6	+27	+34
Other	0.3	0.1	+50	+97
Spirits[2]	127.3	185.9	+8	+25
Wine brandy	103.4	146.5	+10	+30
Liqueurs	22.6	38.2	+2	+8
Other	1.3	1.2	−38	−17
Cheese	11.9	37.4	+18	+23
Brie	5.1	14.2	+34	+36
Other soft cheese	2.1	6.3	+24	+29
Racing horses for breeding[1]	235	26.4	−20	−37
Natural mineral water[2]	96.6	23.2	+27	+43
Raw feathers and down, for bedding	1.0	18.0	−23	+3
Coffee, decaffeinated, non-roasted	4.1	13.9	+24	+70
Subtotal, major commodities	—	626.0	—	+28
TOTAL agricultural exports to the United States	—	714.7	—	+27

[1]Number of animals.
[2]Quantity in thousand hectoliters.

French Eating Patterns Reflect Changing Lifestyles

Changes in French lifestyles—more women in the labor force, more people eating at restaurants, and more people moving to the cities—have had a marked impact on the food habits of the French people.

While the French still place great emphasis on home cooking, they are consuming more foods out of the home and more processed products.

Here are some details of French consumption petterns that may be of interest to U.S. exporters.

Lots of Meat on the Menu

France is the the No. 1 consumer of meat in the European Community. Pork shows up most often on French dinner plates, followed by beef and veal. Consumption of these meats averaged 39.3 and 31.5 kilograms per person, respectively, in 1983. On top of that, the French consumed 4.3 kilograms of mutton and lamb and 1.3 kilograms of horsemeat.

The average French citizen consumed 17.0 kilograms of poultry meat and 15 kilograms of eggs in 1980, including eggs used by the food industry to make pasta, prepared pie crusts and other items. France ranks second in the EC in per capita egg consumption.

Dairy Products, Produce Also Favored

The French also are second in cheese consumption in the EC at 18 kilograms per person. In butter, they trail only Ireland and Denmark with a per capita use of 9 kilograms. Their butter consumption ranks above the average in the EC. For fresh milk products, however, French consumption is below the EC average.

The French also can lay claim to the No. 3 spot in terms of vegetable consumption, behind only Greece and Italy. French vegetable consumption totaled 117 kilograms per person in 1980/81. Consumption of fresh fruit averaged 54 kilograms per person. Citrus fruit use amounted to 20 kilograms.

The French still are among the world's leading consumers of wine, even though wine consumption has declined dramatically.

In 1960 per capita wine consumption was 130 liters. By 1983 it was down to only 84 liters, a decline of more than one-third. The drop has been in the table wine category. Use of high-quality wines has bucked the trend, rising from 11.5 liters per person in 1959-62 to 20.5 liters in 1980-81.

Frozen, Canned Products Use Climbs

French consumption of frozen foods destined for direct use (which excludes consumption by industry) reached a record high of 788,000 metric tons in 1982. That was 86 percent more than in 1976. Imports represented about one-third of the 1982 total.

For canned items, consumption of vegetables other than tomatoes and mushrooms rose by 17 percent to 803,000 metric tons (gross weight), between 1976/77 and 1982/83. This reflected a 15-percent gain in per person consumption to 14.8 kilograms (gross weight) in 1982/83.

That same year per capita consumption of canned tomato products amounted to 2.7 kilograms (net weight), up slightly more that a third from 1976/77.

The strongest growth area in canned vegetables was mushrooms, where per capita consumption increased by 45 percent between 1976 and 1982 to 1.6 kilograms. ■

This article is based on materials supplied by the staff of the U.S. Agricultural Counselor in Paris.

French Food Retailing: Changes Benefit U.S. Exporters

By Philip A. Letarte

Supermarkets and "hypermarkets"—which the French define as food stores that also carry general merchandise—have established a firm foothold in the French marketplace over the past decade. And that change bodes well for U.S. exporters because these stores are promising volume buyers for imported frozen foods, beverages and other general grocery items.

A Mini-Revolution in a Decade

In the early 1970s, food marketing in France was still overwhelmingly handled by specialty stores—such as butchers, bakers, dairy and produce shops—and small independent grocery stores. In fact, these two types of stores represented slightly over 70 percent of the food marketing system.

Since that time there has been a mini-revolution in the marketplace.

Attracted by the roomier sales areas and lower prices of super and hypermarkets, French shoppers nowadays are purchasing over two-fifths of their foods from these large stores. In 1970, these stores accounted for only about 15 percent of the food sales.

The growth in the large stores' market share has largely been at the expense of the small grocery stores. In 1970, these stores dominated the French marketplace, with about 36 percent of total food sales. Today they are in the No. 3 spot with a share of 18 percent, trailing the super and hypermarkets as well as the specialty stores.

The specialty stores have held their own, accounting for 35 percent of total food sales in 1970 and roughly 30 percent in 1980. Even though they charge higher prices, these stores remain in favor with French consumers because they offer high-quality and individualized service.

Where the Large Stores Have Succeeded Best

So far, large retailers have been able to generate significant sales volume in

Representative Merchandising Organizations in France

Societe Parisienne d'Achats en Commun (SPAC)—102, rue de Provence, 75009 Paris—is the buying agency for the 70 department and variety stores of Prisunic. In the United States, Kirby-Block, Inc., 393 Seventh Avenue, New York, N.Y. 10001, acts as buying agent for these department and variety stores.

Societe Centrale d'Achats (S.C.A.)—1 rue Paul Cezanne, 75008 Paris—is the buying agency for the 277 variety stores of Monoprix and Uniprix.

Societe Parisienne d'Achats et de Manutention (SPAM)—25 Chaussee d'Antin, 75009 Paris—is the buying agency for the food section of the eight department stores of Galeries Lafayette and the four stores of Inno France.

Their buying agency in the United States is Mutual Buying Syndicate, 11 West 42nd Street, New York, N.Y. 10036.

Societe Nouvelle d'Approvisionnement Commerciale (SONAC)—66 rue des Archives, 75003 Paris—is the buying agency for the 55 branch stores of Societe Francaise des Nouvelles Galeries Reúnies and Bazar de l'Hotel de Ville.

Societe Generale d'Achats du Bon Marche—38 rue de Sevres, 75007 Paris—is the buying agency for the department store of Au Bon Marche.

Groupement d'Achats des Grands Magasins Independants (GAGMI)—89 rue d'Amsterdam, 75009 Paris—is the buying agency for 160 independent department stores, popular chain stores and supermarkets.

Paridoc—52 rue de Clichy, 75009 Paris—is the buying office for 7,630 small retail stores and 300 supermarkets of Mammouth, Suma and Felix Potin.

The following supermarkets also buy directly:

Auchan
Rue de la Cousinerie
59650 Villeneuve de Ascq

Carrefour
3 AE Saint-Guenault
CE 1202 Councouronnes
91021 Evry

Casino
24, rue de la Montat
42100 Saint-Etienne

Euromarche
180, Route Nationale 7
92100 Antis-Mons

beverages, general grocery items, dairy products and frozen foods.

The specialty shops still dominate in the areas of bakery and pastry items, seafood, delicatessen foods, produce and meat and poultry.

Future Prospects

Marketing experts in France expect some slowing in the growth of super and hypermarkets during the rest of the decade.

Hypermarket numbers, now about 500, may expand to about 600 by 1990, a gain of about a fifth. Supermarkets are projected to climb from about 4,200 stores to 5,800 in 1990, a gain of about 40 percent.

Small grocery stores, particularly independents, are expected to continue to dwindle in number and importance. However, the rate of decline will be stemmed somewhat by the increased adoption of franchises by independents.

The specialty stores will not be completely immune to the competition offered by the super and hypermarkets. By the end of the decade, the specialty stores' share of total food sales probably will be down to about a fourth.

The major product areas where super and hypermarkets are forecast to make inroads between now and 1990 are bakery and pastry items, seafood, frozen foods, cheeses, meats and poultry and deli items. Their share of the beverage and general grocery sectors likely will rise as well, although not as dramatically as in the past. ■

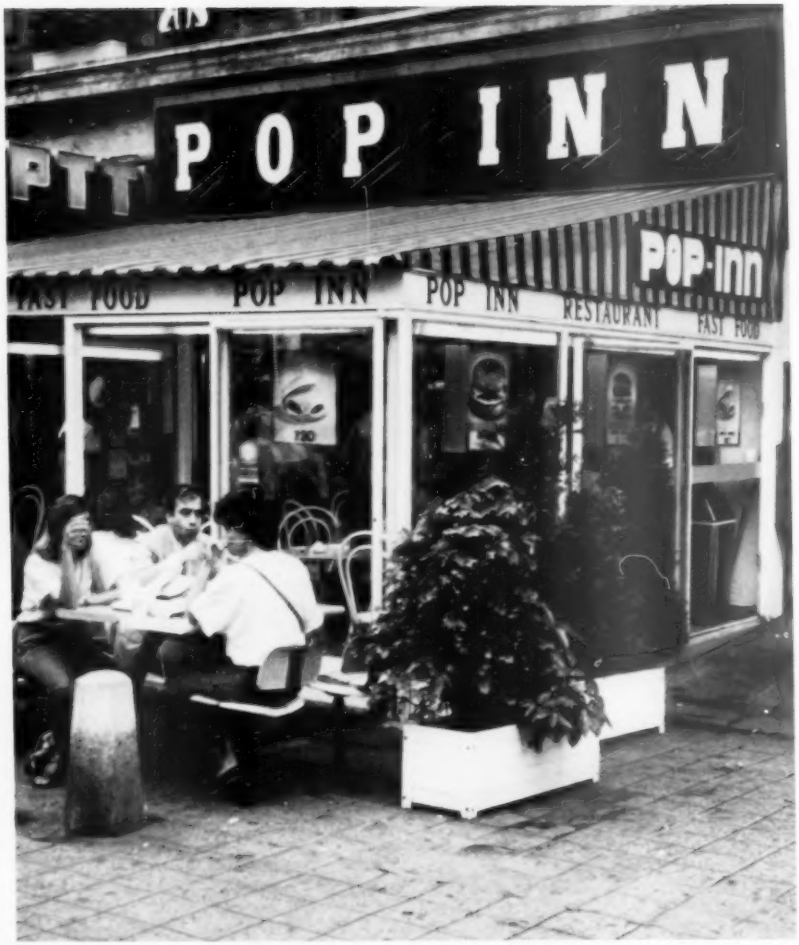
The author is an agricultural attache in the U.S. Embassy, Paris.

Super and Hypermarkets Account for Growing Share of French Food Sales

	1980	1985*	1990*
	Percent	*Percent*	*Percent*
Bakery, pastry items	7.5	10.7	14.0
Fish	17.0	21.5	27.0
Delicatessen foods	24.0	28.5	31.5
Fruits and vegetables	28.0	31.5	35.0
Poultry products	28.0	33.0	36.0
Butchery products	30.5	37.0	42.0
Frozen food	33.0	42.0	49.5
Dairy products	38.0	47.0	50.5
Grocery line	38.0	47.5	51.5
Beverages	39.9	48.0	52.0
Total	32.1	37.1	40.5

*Projected.

Fast Foods Boom in France



By Mary Revelt

"They will never catch on."

"They cannot possibly succeed here."

"The whole concept is just out of step with the national palate."

When the first "fast food" restaurant opened in France in 1971, the reaction of the restaurant trade was fairly skeptical. Indeed, it has taken a while—in fact, about a decade—for fast foods to really catch on. But since 1980 there has been a virtual boom in the French industry, with the number of fast food outlets on French soil soaring from 110 to 725 in 1983.

A Small but Dynamic Market

Although the fast food industry still represents less than 2 percent of France's total restaurant receipts, growth in fast food restaurant receipts since 1980 has been spectacular. Total revenue for the fast food industry in 1983 was up more than two-fifths from the year before to almost 2 billion francs (roughly $250 million).

Last year fast food restaurants were expected to serve 114 million meals, or more that 6 percent of the 1.8 billion meals served annually by France's commercial eating establishments.

Today, the majority of fast food outlets in France are not part of chains—either directly or indirectly.

Independents have come to represent close to 60 percent of all outlets, although their revenue represents only 44 percent of the industry's total income.

The twelve most important chains in France are being cautious about expansion plans. In 1983, they opened only 53 new outlets, less than half of those planned. Nevertheless, the chains continue to offer stiff competition in the French marketplace.

Hamburgers Top Dogs

The hamburger dominates the French fast food market. Hamburger outlets comprise about 54 percent of all fast food outlets, up from only about a third in 1981.

In second place is the hot dog, although outlets specializing in these products have lost ground. They now represent about 30 percent of total outlets, versus 44 percent in 1982.

Both of the top two performers are being challenged by firms offering innovative sandwich lines, tarts, quiches and crepes. In addition, about a tenth of the French fast food establishments offer a broader menu that includes hamburgers, hot dogs, chicken, salads and sandwiches.

A Market to Watch

The rapid increase in the number of independent fast food outlets—and in the development of menus featuring a variety of new offerings—suggests that fast food restaurants are becoming integrated into the traditional French restaurant market.

U.S. exporters with an eye to selling in France should keep a close eye on the fast food industry. Not only is this a growing and dynamic segment of the French marketplace, it is also having a pronounced impact on the rest of the French restaurant trade.

Many of the ideas and technologies used in fast food retailing are beginning to rub off on traditional French cafes and restaurants—signaling a potential revolution in the marketplace. ■

The author, formerly an agricultural attache in Paris, is now in Brussels.

LA BRIOCHE MISTER GOOD FAST
free time Love Burger
O'100 DWICHS Frit BEACH BURGER
Kitch ASTERIX BURGER 506 pam Lord Sandwich

Fast Food Outlets in France[1]

Name	No.	Menu
Am. Cookery	2	Miscellaneous
Asterix Burger	6	Hamburger
Beach Burger	1	Hamburger
Big Nino	2	Hamburger, sandwich, salad, chicken
La Bolee	1	Crepe, grilled steak
La Brioche	55	Hot dog, sandwich, salad
Buffalo	2	Hamburger
Buncho	2	Hot dog, sandwich, pizza
Burger King	5	Hamburger
100 Dwichs	2	Sandwich, salad
Chic O'Bouffe	1	Miscellaneous
Circus Burger	3	Miscellaneous
Comod Burger	4	Hamburger
Crocker's	1	Miscellaneous
La Croissant erie	57	Hot dog
Dallas Burger	1	Miscellaneous
Aux Delices du Gravier	1	Miscellaneous
La Feuillantine	1	Miscellaneous
Flash Burger	1	Miscellaneous
Franquette	18	Hot sandwich
Free Time	160	Hamburger, chicken, salad
Frit 506	3	Miscellaneous
Gourmandise Fast Food	3	Miscellaneous
Guillams & Burger	1	Miscellaneous
Aux Iles Sandwiches	1	Miscellaneous
Katy's Burger	6	Hamburger
Lord Sandwich	2	Sandwich, salad, pastry
Love Burger	2	Miscellaneous
McDonald's	15	Hamburger
Mac FLO	1	Hamburger
Manhattan Burger	12	Hamburger chicken, salad
Mini Ferme	2	Pasta, eggs
Mister Cook	1	Hamburger
Mister Good Fast	9	Pizza
New Croq	1	Miscellaneous
O'Kitch	18	Hamburger
Pam	1	Miscellaneous
Pandy Food	4	Hamburger
Pars	1	Sandwich
Au P'tit Creux	2	Sandwich, quiche, Crepe, ice cream
La P'tite Bouffe	1	Hot dog, sandwich
Pic Pain	1	Miscellaneous
Pizza Inn	2	Pizza
Pizza Top	2	Pizza
Point Chaud	23	Hot dog, sandwich
Pomme de Pain	11	Sandwich
Quarte Pentes	1	Miscellaneous
Quick	33	Hamburger
Riff Burger	1	Hamburger, chicken, salad
Signor Pronto	1	Miscellaneous
Tartanous	1	Tarts, pies
Tartin Shop	1	Hot dog, sandwich, confectionery
Tarte Julie	7	Tarts, pizza
Tout Chaud	8	Hot dog
Sweet Charlotte	6	Miscellaneous

[1]As of 1983.

Fact File

Fiscal 1984 Wrap-Up

U.S. Agricultural Exports

U.S. agricultural exports in fiscal 1984 rose to $38 billion, a 9-percent increase. Export volume, however, declined for the fifth year in a row. The drop of about 1 percent brought the export level to 143.7 million tons. Export sales to centrally planned countries jumped 67 percent following a 53-percent drop the year before. Exports to developed and less developed countries also rose, but less dramatically. The most significant increase was in sales to the Soviet Union, which registered a gain of 156 percent over 1983. Sales to Sub-Saharan Africa also were up by 62 percent. Sales to most of Europe, South Asia and Oceania declined.

U.S. Agricultural Exports Increase

Region	1983	1984	Change
	$ Bil.	*$ Bil.*	*Percent*
Western Europe	10.148	9.264	−9
EC	7.628	6.717	−12
Other	2.519	2.547	+1
Eastern Europe	.827	.741	−10
USSR	.983	2.512	+156
Asia	13.588	15.209	+12
Middle East	1.482	1.865	+26
South Asia	1.170	.867	−26
Japan	5.888	6.935	+18
China	.546	.692	+27
Other East	3.293	3.631	+10
Southeast	1.203	1.218	+1
Canada	1.870	1.936	+4
Africa	2.272	2.868	+26
North Africa	1.452	1.542	+6
Sub-Saharan	.821	1.327	+62
Latin America	4.858	5.279	+9
Mexico	1.777	1.967	+11
Central & Caribbean	1.130	1.223	+8
South America	1.952	2.089	+7
Oceania	.223	.216	−3
Total	**34.769**	**38.025**	**+9**
Developed Countries	18.511	19.179	+4
Less Developed Countries	13.904	14.901	+7
Centrally Planned	2.356	3.945	+67

Export values rose in 7 of the top 10 agricultural markets in fiscal 1984, with the largest percentage increase in Soviet purchases. Export sales dropped in three markets with the Netherlands showing a 21-percent decline; Germany, 13 percent and Egypt, 5 percent. Japan remained the top market in 1984, with the USSR moving up to the No. 2 spot from No. 9 in 1983. There were no newcomers to the Top 10 list in 1984.

Exports Rise in 7 of Top Ten Markets

Market	1983	1984	Change
	$ Bil.	*$ Bil.*	*Percent*
Japan	5.888	6.935	+18
USSR	.983	2.512	+156
Netherlands	2.765	2.188	−21
Mexico	1.777	1.967	+11
Canada	1.870	1.936	+4
South Korea	1.713	1.816	+6
Taiwan	1.237	1.406	+14
West Germany	1.454	1.260	−13
Spain [1]	1.038	1.190	+15
Egypt	.889	.845	−5

[1] Includes Canary Islands.

The Top 10 Exports

Corn led the top 10 individual export categories in value of sales with a 23-percent increase over 1983. More than half of the commodities gained in value. Declines were logged for soybean cake and meal, tobacco, soybeans and horticultural products.

On a volume basis, only two of the top 10 U.S. farm exports logged gains in fiscal 1984. Shipments of cotton and linters jumped 24 percent during the year, and wheat rose 14 percent. Exports of wheat flour, sunflowerseed and soybeans recorded the biggest percentage declines.

Many Major Commodities Increase in Value

Commodity	1983	1984	Change
	$ Bil.	*$ Bil.*	*Percent*
Corn [1]	5.717	7.022	+23
Wheat & products	6.169	6.737	+9
Soybeans	5.866	5.714	−3
Livestock & products	2.995	3.460	+16
Horticultural products	2.689	2.606	−3
Cotton & linters	1.703	2.405	+41
Tobacco	1.487	1.433	−4
Soybean cake & meal	1.449	1.203	−17
Feeds & fodders	1.145	1.165	+2
Rice	.874	.897	+3

[1] Excludes products.

Corn and Wheat Lead in Export Volume

Commodity	1983	1984	Change
	Mil. MT	*Mil. MT*	*Percent*
Corn [1]	47.105	47.001	—
Wheat	36.696	41.700	+14
Soybeans	24.522	19.198	−22
Feeds & fodders	6.991	6.845	−2
Soybean cake & meal	6.449	4.931	−24
Horticultural products	3.041	2.854	−6
Cotton & linters	1.209	1.498	+24
Animal fats	1.431	1.378	−4
Wheat flour	1.529	1.074	−30
Sunflower-seed	1.363	.998	−27

[1] Excludes products.

Top 10 Markets' Purchases of Leading Commodities

(In million dollars)

Country [1]	Corn	Soybeans	Wheat & flour [2]	Livestock & prod.	Horticultural prod.	Cotton & linters	Feeds & fodders	Tobacco	Soybean cake & meal	Rice
Japan	2,074	1,257	557	850	483	594	178	312	2	1
USSR	942	123	1,182	46	8	168	—	1	—	—
Netherlands	96	807	75	82	70	3	608	66	166	16
Mexico	436	409	3	227	28	1	9	—	11	—
Canada	22	74	5	251	805	79	45	7	106	44
South Korea	454	215	301	323	13	443	3	—	15	—
Taiwan	403	414	106	166	37	143	7	62	—	—
West Germany	15	256	2	84	137	74	172	140	271	8
Spain	284	507	—	41	16	35	—	193	15	12
Egypt	195	10	323	149	2	—	1	26	4	—
Total	**4,921**	**4,072**	**2,554**	**2,219**	**1,599**	**1,540**	**1,023**	**807**	**601**	**81**

[1] Not adjusted for transshipments. [2] Includes products.

U.S. Agricultural Imports

U.S. agricultural imports in fiscal 1984 totaled $18.9 billion, up 15 percent from the year earlier. Coffee and fruits, nuts and vegetables again headed the import list. They were followed by meat and meat products, wines and malt beverages and sugar and related products. U.S. imports of both competitive and noncompetitive items rose. The largest percentage increases were registered by oilseeds and products, spices, rubber and allied gums, and fruits, nuts and vegetables. Imports of tobacco, meat and products and other animal products dropped.

Coffee, Horticultural Products Head Import List

Commodity	1983	1984
	$ Bil.	*$ Bil.*
Competitive		
Fruits, nuts & veg.	2.320	2.942
Meat & meat prod.	2.092	1.931
Wines & malt beverages	1.317	1.510
Sugar & related prod.	1.134	1.347
Dairy & poultry prod.	.780	.877
Oilseeds & prod.	.523	.796
Live animals	.535	.596
Tobacco, unmanufactured	.734	.563
Other animal prod.	.509	.500
Other competitive prod.	.842	1.158
Total competitive	**10.806**	**12.200**
Noncompetitive		
Coffee, green & processed	2.832	3.300
Cocoa beans & prod.	.829	1.058
Rubber & allied gums	.582	.854
Bananas, plantains	.585	.666
Tea	.128	.189
Spices	.173	.206
Other noncompetitive prod.	.336	.400
Total noncompetitive	**5.465**	**6.678**

Trade Balance

The U.S. agricultural trade balance amounted to $19.1 billion in fiscal 1984; up from $18.45 billion the previous year. The 9-percent increase in exports helped to counteract a 15-percent increase in imports, resulting in a 3.5-percent increase in the U.S. agricultural trade surplus.

Agricultural Trade Surplus Up

	1983	1984
	$ Bil.	*$ Bil.*
Exports	34.78	38.01
Imports	16.38	18.91
Trade surplus	18.45	19.10

Exports of Horticultural Products To Rise in 1985

By Jonathan Gressel

After several years of shrinking trade, U.S. exporters of horticultural products can take heart in the recovery forecast in January for fiscal 1985.

If the U.S. dollar remains stable as expected, the value of horticultural exports may rise to $2.7 billion, a 5-percent gain over last year. Exports of tree nuts, non-citrus fruits and processed vegetables are expected to lead the way, scoring substantial increases in both volume and value.

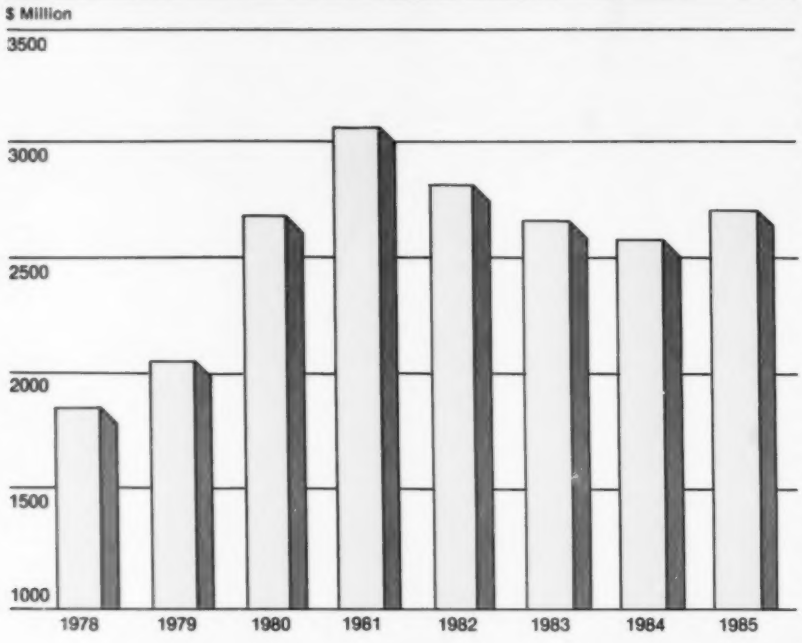
Economic Situation Figures Prominently in Export Upturn

Economic growth is most promising in the Far East, where U.S. horticultural sales reached $833 million in 1984, nearly doubling the annual average posted for 1976-80.

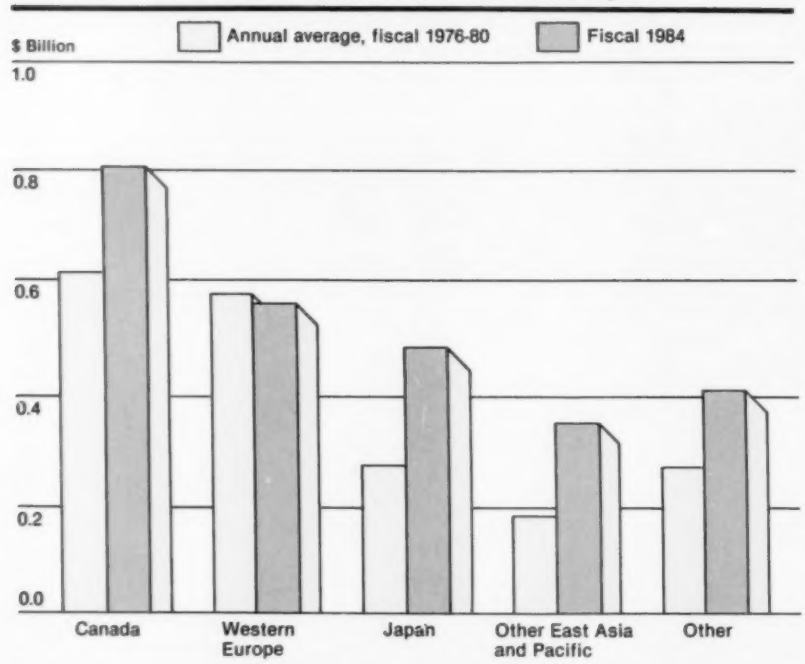
Hong Kong, Malaysia, Singapore and Taiwan are expected to be the front-runners, showing rapid economic growth. But even in Japan, where growth will be somewhat slower, exports will be aided by increased consumer spending, the relaxation of some import restrictions and the anticipated stronger yen.

Even with the prediction of a general economic slowdown, Canada will continue to account for 30 percent of U.S. fruit and vegetable exports as consumer spending continues to increase

U.S. Horticultural Products Will Score 5-Percent Gain in 1985



Asian Markets Show Greatest Growth for U.S. Horticultural Exports



at a healthy pace. Canadian purchases of U.S. horticultural products took in $805 million in 1984.

Despite low rates of growth in most of Western Europe, economic conditions in major export markets there favor at least small increases in consumer spending. That should help stabilize U.S. export earnings in the face of increased competition, allowing the United States to at least match last year's sales level of $559 million.

The hottest market in this region will be West Germany because of its improving economy.

But the news is not all good. Arabian Gulf markets may stagnate as declining oil revenues slow the pace of construction and lower the number of foreign workers who are the major source of growth in U.S. horticultural exports to the region. Despite this continuing trend, U.S. fruit and vegetable exports in fiscal 1984 reached $123 million, a 6-percent increase over the previous year.

Latin American markets also figure to be disappointing. Despite possible improvement in economic conditions there, increased sales will not occur as long as import restrictions continue in this once-important market.

Record Almond Crop Will Boost Tree Nut Exports

Exports of tree nuts are expected to account for 50 percent of the growth in the value of this year's horticultural exports. Sales abroad are forecast to increase to $438 million, an 18-percent jump over last year.

With California reaping a record almond crop at a time when supplies from major competing countries are reduced, the United States will be able to continue the export growth registered in 1984.

Even though almond prices will be down, U.S. export earnings from almonds and products will likely increase to $296 million or about 8 percent over fiscal 1984.

The value of U.S. almond exports to European markets is expected to rise above 1984's level of $160 million. If the

value of the U.S. dollar stabilizes as predicted, sales may improve even more.

Increased tonnages also are forecast for non-European markets, particularly in the Middle East and Far East. Promotional activities in Japan and Korea by the California Almond Growers Exchange, as well as the relaxation of the Korean import quota, should boost sales to these two countries.

In spite of increasing foreign competition, abundant supplies of large-sized walnuts in the United States and tight supplies among U.S. competitors will foster a 16-percent increase in exports, with prices expected to increase 5 to 10 percent. U.S. inshell walnut exports should reach $54 million in 1985.

Aggressive Promotion To Help Lift Exports of Non-Citrus Fresh Fruits

Through trade shows, seminars and sales teams, the California Table Grape Commission and the Northwest Horticultural Council have generated increased interest in non-citrus fresh fruits in Far Eastern markets, particularly Hong Kong, Singapore and Taiwan.

Promotional activities are underway to improve sales of apples and pears in Europe and the Middle East; the latter market also has been targeted for grape promotions.

U.S. apple exports may reap as much as $130 million in 1985. Considerable gains will be registered in the Middle East and Far East, largely due to aggressive promotion as well as the desirable size and quality of the U.S. product. Sizable increases in volume should come from Saudi Arabia and other Arabian Gulf countries. The outlook for Taiwan, a key market in the Far East, is less clear at this time—demand may recover from last season's downturn if marketing problems are overcome.

Canada will continue to be an important outlet for U.S. apples, but Latin American markets will continue soft.

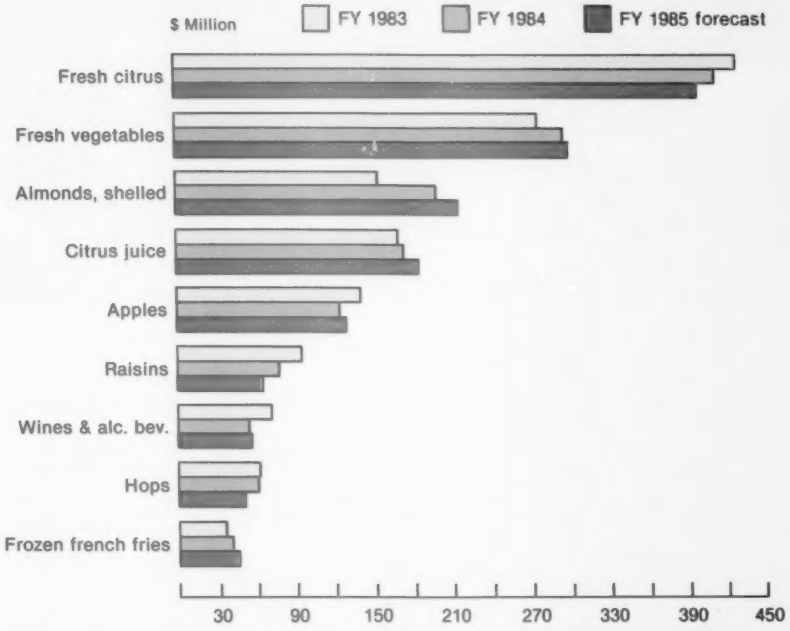
Slight increases in U.S. pear exports—particularly in Scandanavia and the Middle East where U.S. product size and quality are preferred—will be fostered by crop shortfalls in Europe and Canada. Most of the anticipated 11-percent increase in pear sales will come from Canadian, Swedish and Saudi markets. Overall, U.S. pear exports are forecast at $121 million in 1985.

Exceptional quality gave the 1984 U.S. table grape crop an export boost even though the harvest was substantially smaller than in 1983. Sales in fiscal 1985 should reach $100 million. Canada will remain the principal market for U.S. table grapes, but a substantial increase in volume is expected for the expanding Far East market.

Citrus Juice To Be Among Other Gainers

Recent price increases should give U.S. orange juice a 7- to 10-percent boost over 1984's $173-million mark even though volume will remain stable. Tight orange juice supplies have created stronger demand for grapefruit juice and bolstered prices. Elimination of Japan's import quota also will help the situation.

U.S. Almonds and Citrus Juice Exports Lead Horticultural Gainers in 1985



Frozen vegetables are expected to jump 10-percent in value, reaching $108 million in 1985, while volume will be 150,000 tons, an 11-percent increase.

Promotional efforts for frozen potato products by the National Potato Promotion Board have met with success in Japan, Hong Kong and Singapore, further enhancing the strong Far East market. The export volume of U.S. french fries is predicted to climb by 14 percent.

While fresh vegetable exports will be somewhat static in 1985, onions are an exception. Failure of the Hokkaido, Japan, storage crop and weather damage to the South Korean crop have opened the doors for U.S. onions in Japan. Onion exports may score a 40-percent leap to 140,000 tons. Value, however, will be pegged at $39 million, up only 23 percent due to lower unit prices. ■

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U.S. Ornamental Plants Making a Name in Foreign Markets

By Steve Homrich

We water our house plants, make sure they have the right light, the right food and a suitable room temperature. We pot them, root them and ask our neighbors to care for them while we are away. Some of us even talk to them. Hardly a home or office in this country is without at least one.

And we Americans are not unique in our love of indoor plants. All over the world they decorate not only homes and offices, but also hotels, restaurants, shopping malls and other public places.

Although the United States is the world's top producer of ornamental plants, it ranks fifth among exporters, after the Netherlands, Denmark, Belgium-Luxembourg and West Germany.

From 1974 to 1983, exports of U.S. ornamentals rose more than fivefold to an all-time high of $28.9 million, according to U.S. statistics. However, sales were down to about $23.1 million last year, and are expected to drop slightly again in 1985 as competition increases.

Major Markets

Canada is by far the largest customer for U.S. ornamentals, accounting for $13.2 million or nearly 57 percent of exports.

Saudi Arabia is the next largest, with about 10 percent of overall U.S. sales and about 85 percent of U.S. sales to the Middle East. Purchases of U.S. ornamental plants in the Middle East have shown a spectacular growth during the past 10 years, from only $11,000 in 1975 to $3 million today. The Middle East is expected to continue as the fastest growing market for U.S. exports of ornamentals.

This growth has come about partly as a result of the boom in commercial and residential construction projects in the Middle East. Architects and designers are being encouraged to include space for ornamental plants in their building plans.

Other major markets are the Far East, with Japan accounting for about 95 percent of U.S. ornamentals to that region, and Latin America, particularly the Caribbean.

The European Community (EC) is a large and growing market for indoor plants. U.S. sales to the EC last year were $2.4 million, down about 21 percent from 1983, a drop blamed mostly on the strength of the U.S. dollar. However, it appears that the strength of the dollar was less detrimental to U.S. exports of ornamentals to the EC than to many other U.S. agricultural products, attesting to the potential of that market.

Competition Is Strong

In a growing market worldwide, it is no surprise that competition is heating up quickly. Europe is both a good market for and a competitor of the United States and other producers.

Spain is able to offer ornamental plants to EC countries at a fourth of the U.S. price because of its proximity to the EC, in which it controls 37 percent of sales.

Japan exports plants to the EC but supplies mostly high-priced products such as bonsai trees which pose little or no threat to U.S. exports.

Another interesting situation arising in worldwide sales of ornamental plants is the emergence of developing countries as competitors. These countries, in need of exportable commodities, combine their favorable climates and low production costs to expand output.

Latin America, once a net importer, has begun production and export programs that have made it the fiercest competitor. The result: a doubling of its exports to the EC in only two years.

About half of Latin American output comes from Costa Rica, and most of the remainder from other Central American countries. As unit values of Latin American agricultural exports—including ornamentals—have declined in recent years, export volume from that region has soared.

In Africa, the Ivory Coast is the export leader of ornamental plants, shipping a

U.S. Sales of Ornamental Plants Rank Fifth Among Top 10 Exporters

Country	Value*
	$ Million
Netherlands	648.3
Denmark	123.2
Belgium/Luxembourg	94.9
West Germany	56.7
United States	39.9
France	38.9
Italy	25.6
Yugoslavia	24.5
Canada	18.8
Spain	17.0
Other	60.0
Total	**1147.8**

*1983 United Nations data (latest figures available on world plant exports). Data include live plants, bulbs and other products.

sizable share to the EC. But it, too, has been hurt by strong competition from Latin America.

Strong Industry Initiative

The prime mover of U.S. ornamentals to the overseas market is the Florida Nurserymen and Growers Association (FNGA), formed in 1952 and an FAS cooperator since 1981.

Despite its name, FNGA is a national trade association, but nearly 90 percent of its 1,700 members are in Florida where most of the U.S. tropical ornamentals are grown.

The organization's members span a wide range within the trade—retailers, landscapers and interior designers, allied suppliers, sellers of woody ornamentals and bedding plants and students of the trade.

In recent years, FNGA has concentrated its market development efforts in Denmark, Belgium, Luxembourg, West Germany, Holland and Great Britain. It will also expand this year into the Middle East. The organization has worked hard to help U.S. plant exporters make a name for themselves in world markets.

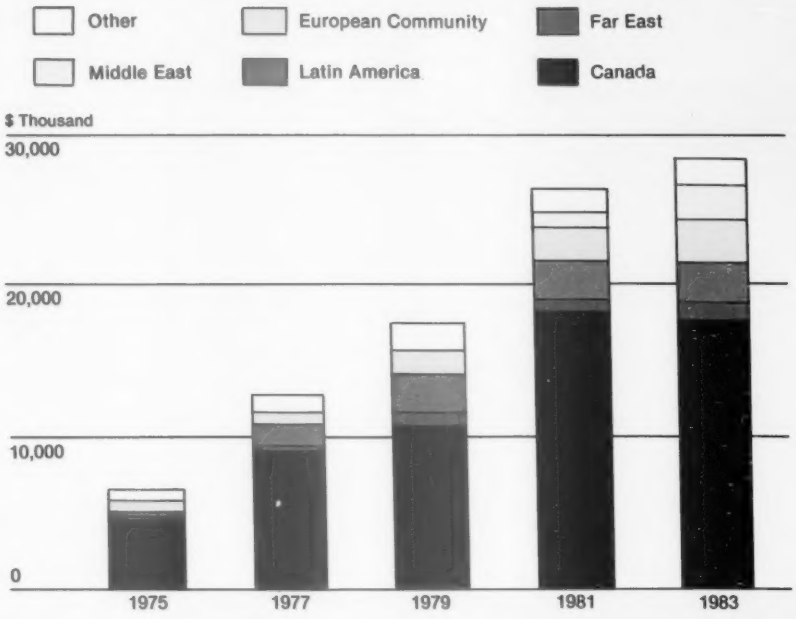
For example, the association participated in a show in Liverpool, England, last year that drew 3.4 million visitors in six months, according to FNGA figures.

During a six-month period in 1982, an exhibition in which FNGA participated in Amsterdam drew more than 5 million visitors and, in only 10 days in 1982, a show in Montreal drew about a half a million people.

Last year FNGA also conducted seminars on the uses and requirements of tropical foliage plants at various locations in Europe.

FNGA has participated in a number of these trade shows with FAS assistance. But to help the association reap the greatest benefits from its participation, FAS has also encouraged FNGA to expand its promotional program to include other activities.

Canada Heads Major Markets for U.S. Nursery Stock and Live Plants



FNGA's immediate plans include the development of technical and supply manuals to aid buyers in the care and use of U.S. plants. Scheduled for publication in April, the information is to be printed in four languages for distribution in Europe.

Also, in late April, FNGA plans to participate in an eight-day trade show in Belgium, co-sponsored by the Florida Department of Commerce. The show has been held every five years since the turn of the century. This will be the first time FNGA will participate in the show. As many as a half million visitors are expected.

Activities within the trade point to the importance placed on buyer-seller contact and, in a recent survey, European trade contacts emphasized their concern by making the following suggestions to boost overseas sales of ornamental plants:

- Marketing programs need to be directed toward foreign architects and building contractors. These groups appear to be inexperienced with the uses and requirements of large plants. As a result, some new buildings are not designed properly for use of indoor plants by decorators.
- U.S. sellers and foreign buyers need more frequent contact.
- Importers should receive more information on shipping requirements, prices and suppliers.
- Research on ways to improve shipping practices is needed to raise the quality of the plants at destination.
- FNGA should participate in more trade shows.
- Promotions should be directed at end users such as architects' clients. ■

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Country Briefs

China

Animal Husbandry Gets Strong Emphasis

China's seventh five-year plan (1986-90), now in the drafting stage, apparently will place strong emphasis on turning grain into animal protein.

Ambitious targets for livestock and products already have been established by the State Economic Commission under a 20-year program for China's food industry. Increases ranging from 10 to 20 times are to be achieved in the production of milk, eggs and beef products by the year 2000. From a nutritional standpoint, the Chinese wish to double the annual intake of meat, eggs and fish from 16 kilograms to what is viewed as a satisfactory level of 36 kilograms.

To realize these goals, the Chinese are striving to increase the quantity and quality of their herds and flocks and at the same time to develop their feed and fodder industry.

The Chinese are interested in introducing new genetics into their herds. Although China will likely continue to import live animals, Chinese officials say they would prefer to import semen, embryos and the relevant technology. New Zealand recently signed a bovine semen trade agreement with China, and USDA is studying a draft agreement. West Germany has donated animal embryos to China. In addition, appeals have been made to expand production of high-protein, lean animals such as cows, sheep, rabbits and poultry. Production of lean meat hogs is also of high priority.

In the feed area, there is keen interest in raising the return on feed by increasing the use of additives and pre-mixes. The Chinese also are working to increase the supply of raw feed ingredients, even though grain supplies have outstripped demand for feed ingredients in some local areas. Officials also have called on producers to vary feed ingredients more, depending on their price.

The pursuit of these strategies is taking place against a background of ongoing changes in livestock raising methods and policies. The gradual disappearance of the "one pot" system and the adoption of contract responsibility systems and specialized household production units is already well documented. However, further changes may be in store.

For example, although milk production has long been the domain of state farm units, Chinese officials are encouraging state-run farms, fish farms and grazing farms to experiment with contracts to households "so that the advantage of public ownership and the enthusiasm of individuals will be brought into full play."—*Norman R. Kallemeyn, Agricultural Counselor, Beijing.*

Egypt

U.S. Beef Liver Demand Keeps Growing

Competition from other suppliers has dampened exports of many U.S. meat products to Egypt in recent years. Countering this trend, however, is a strong surge in demand for U.S. variety meats, especially beef liver. U.S. exports of beef liver to Egypt totaled 16,442 tons worth $18.2 million in 1983, and reached 11,417 tons during the first eight months of 1984. According to trade sources, there is substantial demand for variety meats which remains unmet, representing a possible niche for U.S. exporters interested in tackling this challenging market of 47 million people.

Liver is a staple in the diet of a large percentage of the population, many of whom place it on a par with beef itself. Other factors contributing to its popularity are its economy, ease of preparation, lack of waste, and daily availability. Red meat is sold in Egyptian markets only three days a week.

The offal trade in Egypt is entirely in private hands and relatively free of the burdensome import regulations which affect many products. (All food imports are subject to health inspection, and meat products must be from animals slaughtered according to Islamic ritual.) The port city of Alexandria is a center of this private trade.—*Daniel K. Berman, Agricultural Attache, Cairo.*

Trade and Tariff Act Gets Top Billing in 98th Congress

By Jane L. Laupus
And Gary Blumenthal

The 98th Congress enacted several important bills affecting agricultural trade. Foremost are the Trade and Tariff Act of 1984 and the President's Caribbean Basin Initiative (CBI).

Others include the Agricultural Programs Adjustment Act, the Foreign Sales Corporation Act and provisions to boost the sale of U.S. fish and products in world markets.

Some trade-related bills under consideration failed to see final action. They included legislation directed at agricultural exports and U.S. trade policy in general. Many of these are to be reintroduced in the current 99th Congress as committees in both houses begin to grapple with the multifaceted 1985 Farm Bill and other important agricultural issues.

Leading Actions By the 98th Congress

The Trade and Tariff Act of 1984 signed into law by President Reagan on Oct. 30, 1984, touched on many matters of importance to U.S. farmers and exporters. These include:

- A modified extension of the Generalized System of Preferences for the next eight and a half years;
- Changes in the definition of the U.S. wine industry, effective for two years for trade remedy purposes, and a section on trade reciprocity and export promotion of wine;
- Authority to negotiate a free trade agreement with Israel;
- Non-binding provisions regarding a Section 22 investigation on honey imports, opposition to European Community efforts to limit the import of U.S. corn gluten and soybean products, and limits on copper and steel imports; and
- Changes in the tariff schedule affecting reconstituted orange juice, dairy protein derivatives and other agricultural products.

CBI Stimulates Economic Growth

The CBI was proposed by the Administration as a free trade arrangement to stimulate economic growth and stability by allowing duty-free imports from that region.

This growth should provide better marketing opportunities for U.S. agricultural and manufactured exports as a result of an expected economic improvement in the countries covered by the CBI. Safeguards adopted to protect U.S. agriculture include a limit on CBI duty-free sugar imports and a fast-track import relief procedure for horticultural products (see *Foreign Agriculture*, April 1984).

The Congress also passed the Agricultural Programs Adjustment Act, which set acreage reduction and paid diversion programs, reduced the target price on 1984 wheat and froze 1985 target prices at 1984 levels for wheat, feed grains, rice and cotton.

The Act contained several sections affecting FAS, including: provisions for increased levels for Public Law 480 (Food for Peace) programs and export credit in both fiscal 1984 and 1985; a two-year pilot project for the donation to needy countries of ultra-high temperature (UHT) milk through Section 416 of the Agricultural Act of 1949; and an expansion of that authority to include wheat.

Congress passed the Foreign Sales Corporation provision of the Deficit Reduction Act of 1984. This Act replaces the Domestic International Sales Corporation for eligible companies interested in tax savings on exports (see *Foreign Agriculture*, February 1985).

In addition, Congress approved the National Fishing Enhancement Act of 1984 (P.L. 98-623) with provisions to promote U.S. exports of fish and products through P.L. 480 and export credit programs authorized in the Commodity Credit Corporation Charter Act.

Outlook for the 99th Congress

Congressional initiatives on agricultural trade in the 99th Congress will develop largely out of the quadrennial reauthorization of farm programs in the 1985 Farm Bill, and from recommendations of the National Commission on Agricultural Trade and Export Policy. This commission was set up last year by Congress specifically to recommend changes to "develop, maintain and expand markets for U.S. agricultural products."

While agriculture attempts to adjust its programs and prices to meet the realities of budget restraints and global competition, some sectors of the U.S. economy will continue to place emphasis on import protection that will conflict with the free trade policies essential to the agricultural sector.

Other Issues Facing The New Congress

The 98th Congress considered but did not enact a reform of U.S. trade remedy laws, which would have enabled producers to counter the upstream dumping and natural resource benefits that certain foreign producers receive from their governments.

The trade remedy reforms failed to pass as a result of their potential for backlash against U.S. exporters, but a Section 332 investigation by the International Trade Commission to be released on May 20 could set the stage for redrafting the remedies in this Congress.

Meanwhile, the lapse of the Export Administration Act (EAA) and the failure of House and Senate conferees to reach agreement on its reauthorization in the waning days of the 98th Congress has forced the government's use of the International Economic Emergency Powers Act for control of what are generally high technology exports.

The EAA is the principal authority for controlling certain exports—including agricultural goods—for reasons of national security, foreign policy and short supply. The 99th Congress is likely to take up this issue again. ■

The authors are with the Legislative Affairs Office of FAS. Tel. (202) 447-6829.

Setting a Market Strategy For Your Exports

Is there a market for canned tomato soup in Barbados? Is Suriname buying avocados? Can you ship cheddar cheese to Switzerland?

Answering these questions requires detailed market information—the kind of comprehensive statistical and analytical information on agricultural trade activity found in the Foreign Agricultural Service's new International Marketing Profiles (IMP).

Two series of IMPs are available as part of the FAS Agricultural Information and Marketing Services program for exporters.

Product Marketing Profiles examine the market performance of specific agricultural products—tree nuts, poultry meat or lumber, for example. **Country Marketing Profiles** examine the agricultural trade activity in countries ranging from Algeria to Zimbabwe.

The IMPs present statistical data in a series of easy-to-use tables with information on the magnitude, growth and distribution of agricultural trade. The profiles allow you to quickly locate the value, volume and trade trends of specific products in particular markets.

Both types of IMPs draw on major statistical reporting services from the U.S. Department of Agriculture, the U.S. Department of Commerce, the United Nations and the International Monetary Fund for timely and comprehensive trade information.

Product Marketing Profiles

Product Marketing Profiles provide the following information on 30 groups of agricultural products, principally high-value and value-added items:

Leading Foreign Markets—Identifies countries that have imported a major share of specified products during the past 5 years.

Fastest Growing Markets—Pinpoints the markets on the rise; highlights the overall trade activity for specified products in 14 geographic regions; identifies regions of the world where specified products are in demand, and the countries that seek them.

Best-Selling Products Abroad—Identifies consumer preference among similar products; ranks products that are most actively traded in 14 geographic regions.

Principal Competitors—Identifies competitors and shows their relative strength in the market; compares the market presence of international suppliers in major world markets for a given product.

Country Marketing Profiles

Country Marketing Profiles outline total agricultural trade activity for selected foreign countries. Statistical and financial information helps to pinpoint agricultural marketing possibilities and constraints in particular countries.

Trade tables indicate which food products a country is importing from the United States to help identify foreign import preferences for U.S. products. Trade activity is classified into unprocessed and processed categories.

To discover the overall import structure of a country, tables list total agricultural imports from leading world suppliers. The tables also provide information about the performance of the United States and its competitors.

Market Highlights

In addition to detailed statistical information, each marketing profile includes: an export brief summarizing dynamic trade activity; a schedule of FAS field reports relevant to the profile's coverage; a list of FAS exporter services; and a fact sheet summarizing FAS responsibilities and key contacts.

Each profile costs $50. Custom marketing profiles can be produced for $150. To order the international marketing profiles you need to do business, use the form on the following page.

Indicate which profiles you wish to order by checking the appropriate titles. Send this form with payment of $50 per profile to:

AIMS—Room 4645-S
Foreign Agricultural Service
U.S. Department of Agriculture
Washington, D.C. 20250

Only checks on U.S. banks, cashier's checks or international money orders in U.S. dollars can be accepted. No refunds can be made. Make checks payable to **Foreign Agricultural Service, USDA.**

Order Form

Commodity Marketing Profiles

- ☐ Animal feeds & fodders
- ☐ Animal oils & fats
- ☐ Animals, live
- ☐ Cereal preparations
- ☐ Dairy Products
- ☐ Eggs
- ☐ Fruit, dried
- ☐ Fruit, fresh citrus
- ☐ Fruit, fresh non-citrus
- ☐ Fruit juices
- ☐ Fruit, processed
- ☐ Hardwood logs
- ☐ Hardwood lumber
- ☐ Hardwood plywoods (includes veneers)
- ☐ Hides & skins
- ☐ Meat, prepared
- ☐ Meat, red
- ☐ Nursery products
- ☐ Peanuts & products
- ☐ Poultry meat
- ☐ Seeds
- ☐ Softwood logs
- ☐ Softwood lumber
- ☐ Softwood plywoods (includes veneers)
- ☐ Tree nuts
- ☐ Vegetable oils
- ☐ Vegetables, dehydrated
- ☐ Vegetables, fresh
- ☐ Vegetables, processed
- ☐ Wheat & flour

Country Marketing Profiles

- ☐ Algeria
- ☐ Argentina
- ☐ Australia
- ☐ Austria
- ☐ Bahamas
- ☐ Bahrain
- ☐ Bangladesh
- ☐ Barbados
- ☐ Belgium & Luxembourg
- ☐ Belize
- ☐ Bolivia
- ☐ Brazil
- ☐ Canada
- ☐ Chile
- ☐ China
- ☐ Colombia
- ☐ Costa Rica
- ☐ Cyprus
- ☐ Czechoslovakia
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- ☐ Dominican Republic
- ☐ Ecuador
- ☐ Egypt
- ☐ El Salvador
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- ☐ Germany, East
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- ☐ Ghana
- ☐ Greece
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- ☐ Honduras
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- ☐ Turkey
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- ☐ Zimbabwe

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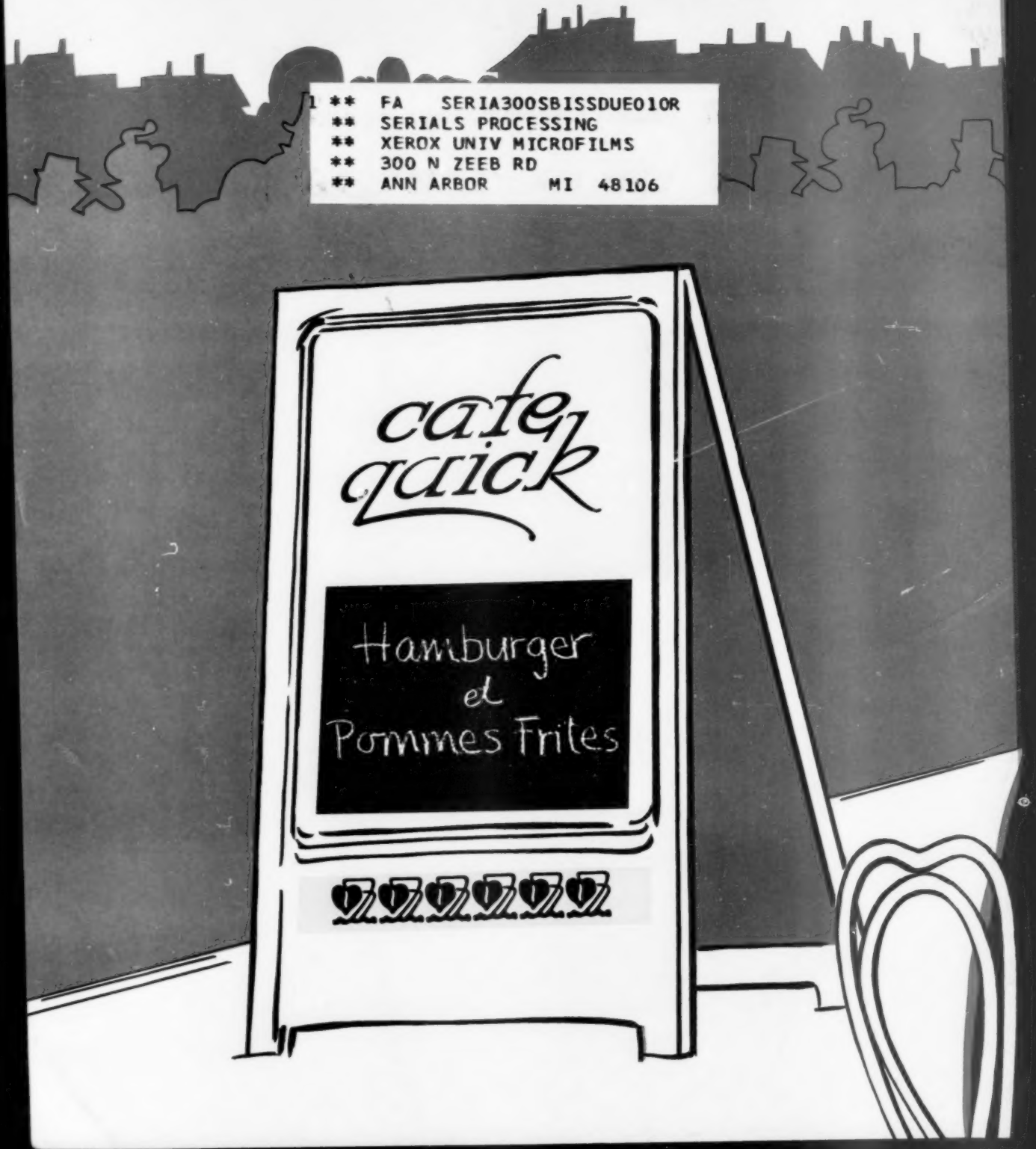
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